Annual Report Templates

EVERGREEN INDIANA
OPEN SOURCE INTEGRATED LIBRARY SYSTEM

Annual Report Templates

- Generating reports for the annual report can be done the same way all other reports are run for each library

- Be sure to use the folder, "Annual Report Templates (EG-IN)"

- *Be sure to log in as the Local Admin (the user who normally runs reports for your library will have created the folders we'll need later)*

Reports

Annual Report Templates

"Annual Report Templates" is found in the Shared Folders→ admin→EI Templates

Questions 10-13, 57 a & b, 58 a-f, 117, and 164 can be answered with the templates in this folder

ISL emailing some results

- ISL will be emailing the data to each library director to answer Questions 10-13 and Question 58 a-f
- This data will come in an Excel spreadsheet
- Libraries with multiple branches will have to total the numbers from all branches

Running reports from the other templates

Annual Report Templates: created by **admin**

Create a new report from selected template ▼ [Submit] **2**

Limit output to 10 ▼

Select All None	name	description	create_time	owner
1 ☑	Q 57 a-b - Circ count by shelving location	Q 57 a-b - Circ count by shelving location. Sort by shelving location to separate # of circulations of children's materials. NOTE: This report includes the shelving locations as named by other EI libraries.	2011-01-04 08:16	admin
☐	Q10 - 13 Registered patrons for annual report	Q10 - 13 Registered patrons -- resident, non-resident, recip borrower, PLAC, student	2011-01-03 09:50	admin
☐	Q117 PLAC loans	Count of circulations at selected libraries by Time Range by profile PLAC and Zip includes alert message	2010-12-30 10:55	admin
☐	Q58a-f Holdings	Count of items at selected library by circ mod	2010-02-01 08:17	admin
☐	Q164a-e - Circ count by material type (audio, video, book, magazine, other)	Q164a-e - Circ count by material type (audio, video, book, magazine, other)	2009-12-22 15:22	admin

1. First select the Report Template you want to run.
2. Then with "Create a new report from selected template" selected, click "Submit"

Report Name

For each template you select you'll name the report. Something like "Circ Counts by Shelving Location" or "Q57" would be fine for the name. You'll need the name in a few minutes, when we look for the "Output" of this report.

Report Name:	
Report Description:	

Template Name:	
Template Creator:	
Template Description:	report includes the shelving locations as named by other EI libraries.
Report Name:	
Report Description:	
Report Columns:	**Circulation-->Circulating Item-->Shelving Location-->Name** **Count of Circulations**
Pivot Label Column:	-- Select One (optional) -- ▼
Pivot Data Column:	Count of Circulations ▼
Choose a folder to store this report definition:	Selected Folder: ⬇ 📁 Report Folders 　└📄 Wendy 　　└📄 Wendy Training

Selecting a Report Folder

Report Name:	████████████████
Report Description:	
Report Columns:	**Circulation-->Circulating Item-->Shelving Location-->Name** **Count of Circulations**
Pivot Label Column:	-- Select One (optional) -- ▼
Pivot Data Column:	Count of Circulations ▼

Choose a folder to store this report definition:	Selected Folder:
	 ⬇📁 Report Folders
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Choose a folder to store this report definition:	Selected Folder:
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	    📄 Wendy Training

You'll select the Report Folder that you use when you run reports for your library.
NOTE: We don't make any selections between the "Report Name" and "Choose a folder to store this report definition"

User-Defined Parameters

Column	Transform	Action	User Params
Circulation -> Check Out Date/Time	Date	Between	Real Date ▼ [📅] [____] - And - Real Date ▼ [📅] [____]
Circulation -> Circulating Library -> Organizational Unit ID	Raw Data	In list	FMPLF / FRPL / FRPLB / FRPLL / FCPL [Add] [Del]

Each of the templates will have the User-Defined Parameters where you'll choose the date range (2010-01-01 **-And-** 2010-12-31)
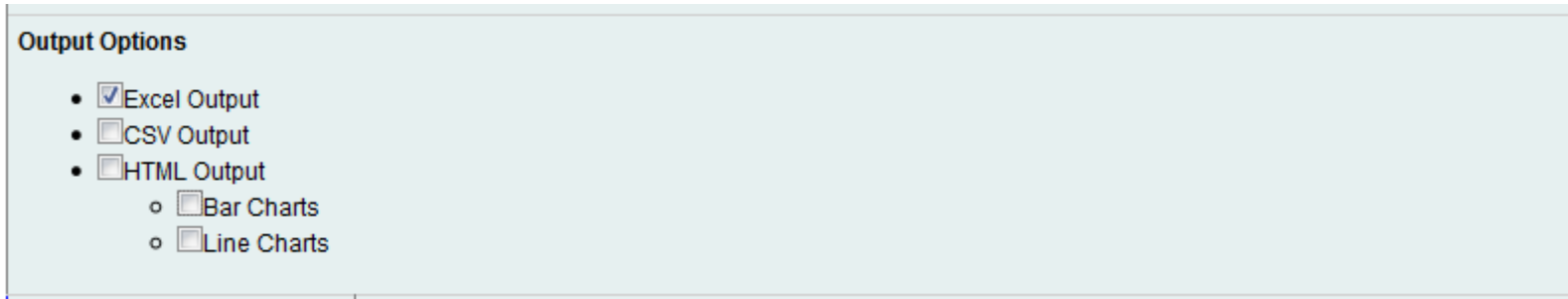
When selected the Organizational Unit ID, be sure to select EVERY BRANCH for your library, for example, FRPLB and FRPLL. DO NOT choose the Library System (FRPL). You'll highlight each branch, and click "Add"

User-Defined Parameters (Selected)

The User-Defined Parameters will look something like this when you have made your selections

Column	Transform	Action	User Params
Circulation -> Check Out Date/Time	Date	Between	Real Date ▼ 📅 2010-01-01 - And - Real Date ▼ 📅 2010-12-31
Circulation -> Circulating Library -> Organizational Unit ID	Raw Data	In list	FMPLF FRPL FRPLB FRPLL FCPL Add Del FRPLB FRPLL

Output Options

Output Options

- ☑ Excel Output
- ☐ CSV Output
- ☐ HTML Output
  - ○ ☐ Bar Charts
  - ○ ☐ Line Charts

Select just Excel Output ***or*** CSV Output. You'll need to get the spreadsheet that will be generated to find the information to answer the Annual Report Questions.

Selecting Time and Entering Email

You can either run the report as soon as possible, or schedule it to run in the future

You can also email the report to yourself or someone else. HINT: Directors can ask the staff person running the report to email the results directly to him/her.

Selecting Output Folder and Saving

Select the Output Folder usually used by your library

Click "Save Report"

If you have not entered some required information, you will get an error message telling you what is missing. If everything is filled in, you'll get a message that says, "Action Succeeded." Just click "OK"

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Getting to the spreadsheets

- If you entered an email address, you can skip ahead to page 17

- Now we will navigate to the output folder you selected before saving

Output Folder
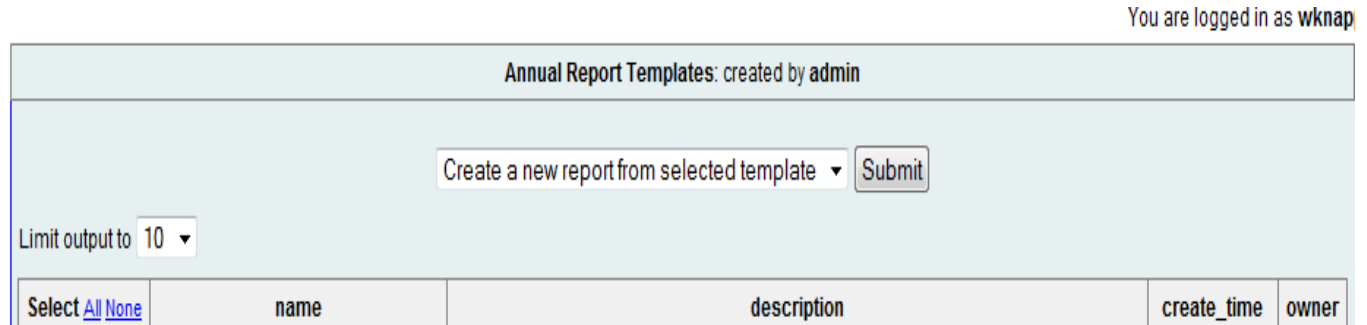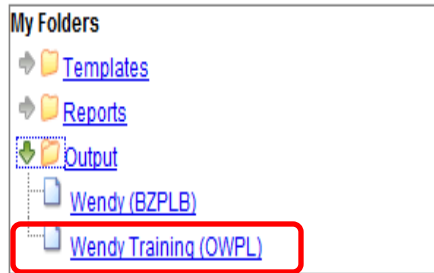
Under "My Folders" – Click on the arrow next to "Output" to expand that folder.

Click the name of the Output folder you selected when you created the report.

Selecting the Output

Manage Folder Contents								Manage Folder			

Wendy Training: created by **wknapp**

View report output ▾ | Submit **2**

Limit output to 10 ▾ **Pending Items**

No items to display

Limit output to 10 ▾ **Completed Items**

Select All None	report	run_time	complete_time	runner	email	folder	error_text	excel_format	html_format	csv_format
1 ☑	**Circ Count by shelving location**	2011-01-04 11:06	2011-01-04 11:06	**wknapp**		435		t	f	f

1. First select the report output you want
2. With "View report output" selected, click "Submit"

Excel (or CSV) Output

- Whether you found this through the output folder or clicked on the link in your email, you'll see a screen like this one:
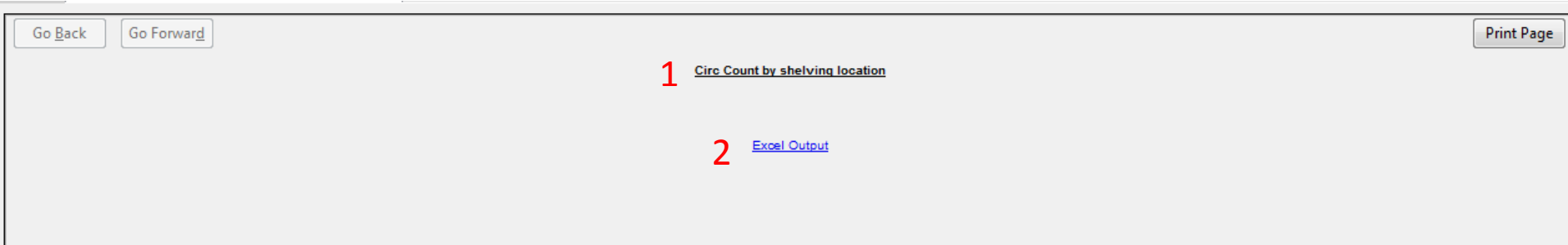
1. This is the title of the report you created
2. Click on the link that says "Excel Output" (or "CSV Output" if you chose that format)

Save the file
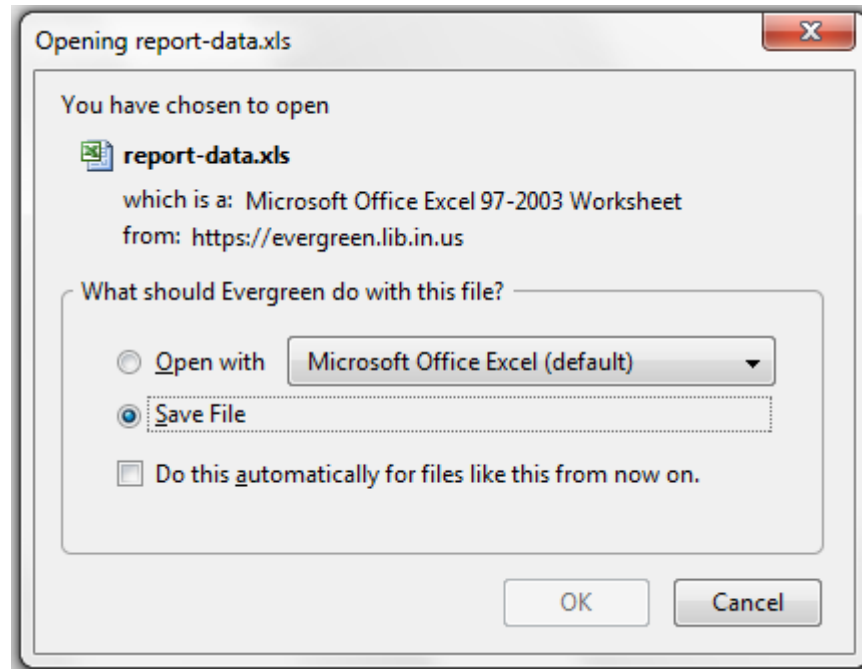
Select "Save File" then Click "OK"

Open the file

Double click on the file to open it in Excel. Note that if you have several reports, you can find the right one by looking for the time on the right.

You can also click "Clear List" after you have opened the file.

What to do with Excel Spreadsheets Question 57

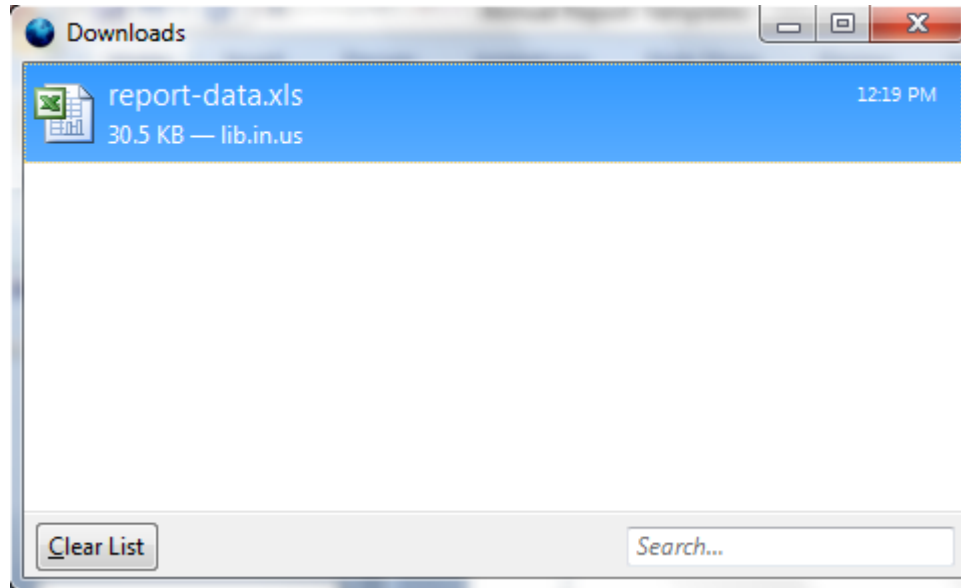- For Question 57, you'll see that the shelving locations listed in Column A are the names of the shelving locations for other Evergreen libraries as well.

- Total Column B to get Total Circulation (Q57a)

- Separate any shelving locations that would include Children's materials (e.g. ones that have Children, Juvenile, J, or Youth in the names)

- Total just the circulation from those Shelving locations to get the answer to Q57b

What to do with Excel Spreadsheets Question 117

- The results for this report will separate the number of circulations by the patron's home zip code.

- Use the Home Zip Code to determine the "Home Library" for the patron

"And the rest"

- Q164 lists the number of circulations by item type
- Q10-13 and Q58 will be emailed to the library director.